



**OX Documents**  
**Major Release v7.8.0**

**Feature Overview**

**V1.0**

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# **1 OX Documents v7.8.0**

## **1.1 Intention of this Document**

This document provides an overview of the new features available in the OX Documents v7.8.0 major release.

The purpose of this document is to help Open-Xchange customers and partners understand the logic behind these changes, especially the reason for enhancements in usability.

## **1.2 Design Goals of OX Documents v7.8.0**

One of the key benefits of OX Documents is the ability to exchange documents in a lossless way with MS Office users (known as “round-tripping”). In this scenario MS Office users will not notice that a document has been edited or created with OX Documents.

A complementary concept in OX Documents is to display the content of MS Office or ODF files when it cannot be edited or created. Examples of this are page attributes or header & footer, which were read-only in earlier releases.

This release of OX Documents focuses on allowing users to create and edit advanced documents containing these kind of elements. For example: header & footer, paragraph styles, page attributes, comments in OX Text and conditional formatting in OX Spreadsheet.

OX Documents also introduces a new way to work with existing presentations. Users can now present online using the new OX Presenter app.

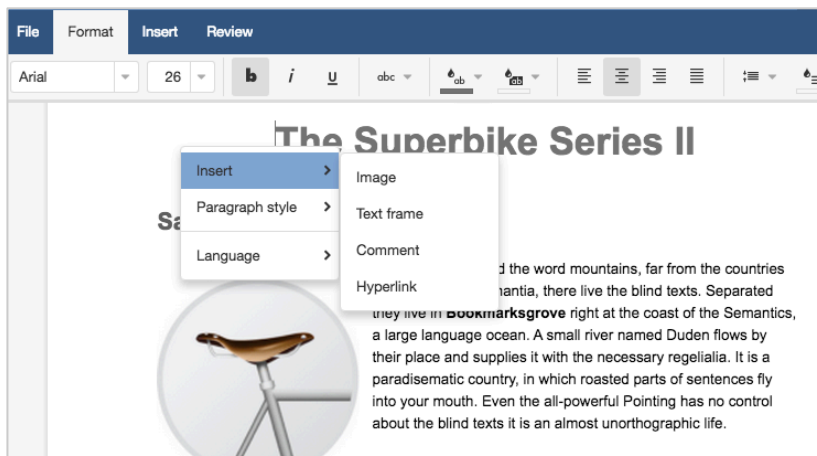
A more detailed overview of all the improvements to OX Documents is provided in the following chapters.

## 2 General Improvements

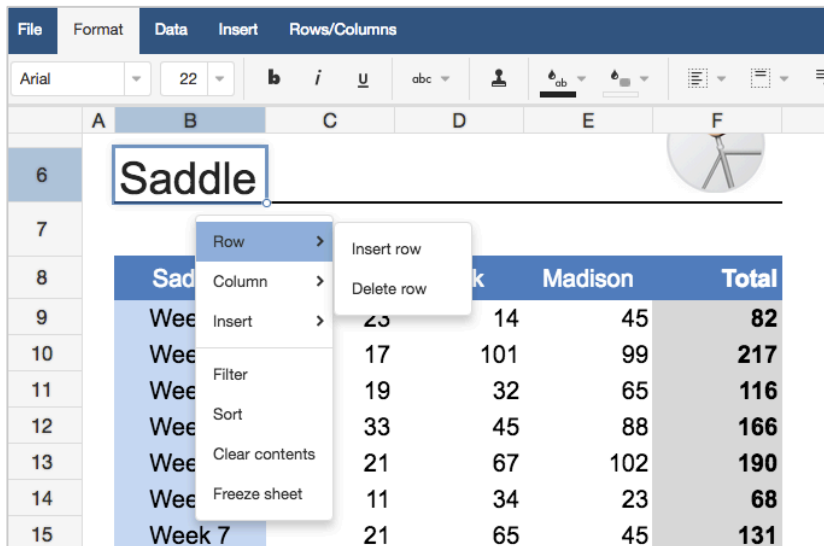
### 2.1 Context Menus

A context menu is a lightweight menu that provides the user with a shortcut to actions related to the selected object, or context, in which the menu was opened. Context menus are now available in OX Document with a right-mouse-click on Desktop platforms. They give users direct access to items that otherwise need more clicks.

Here is an example of a context menu in OX Text, which allows users to insert an image, a text frame or comment without switching to the “Insert” tab.



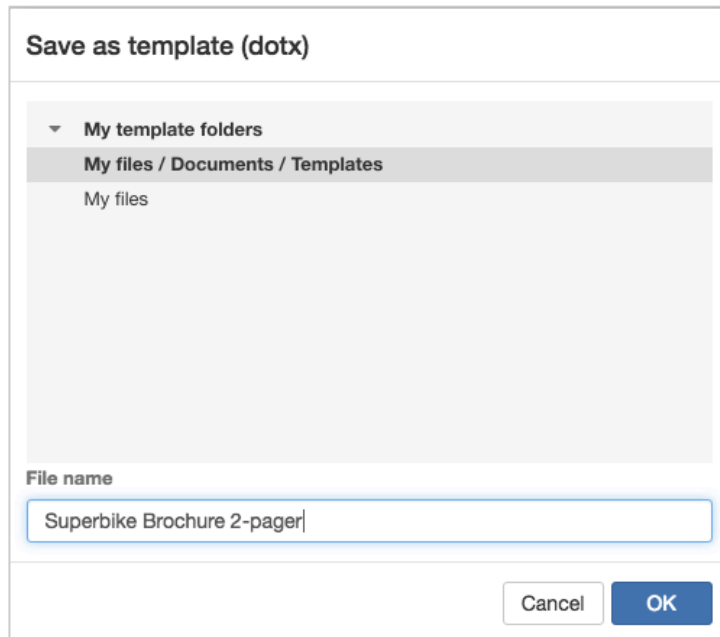
Context menus are also available in OX Spreadsheet.



A context menu can be dismissed by clicking outside of the menu or pressing the ESC key.

## 2.2 Support for New Standard Folders

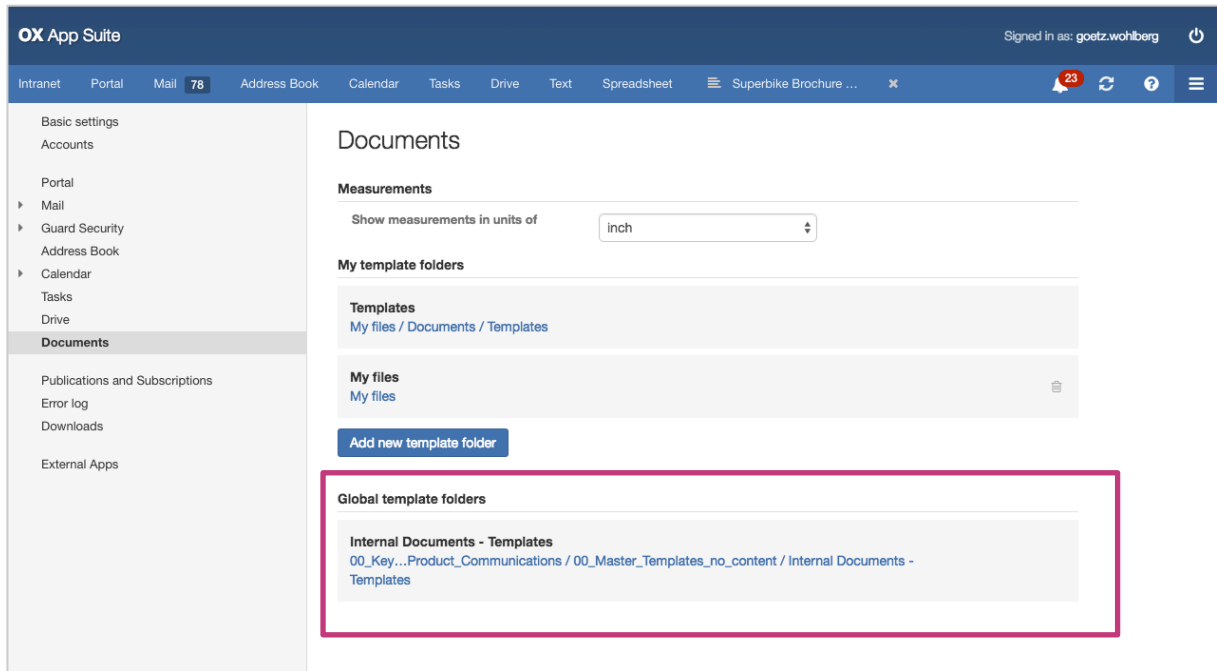
OX Drive introduces new standard folders for documents, music, pictures and videos. OX Documents makes use of these new standard folders. Templates are stored in a “Template” subfolder in the “Documents” folder. If a new document is saved as a template, the default directory in the “Save as” dialog is this new template folder.



If a new picture is inserted into the document, the default directory in the “Insert image” dialog is the new “Pictures” folder.

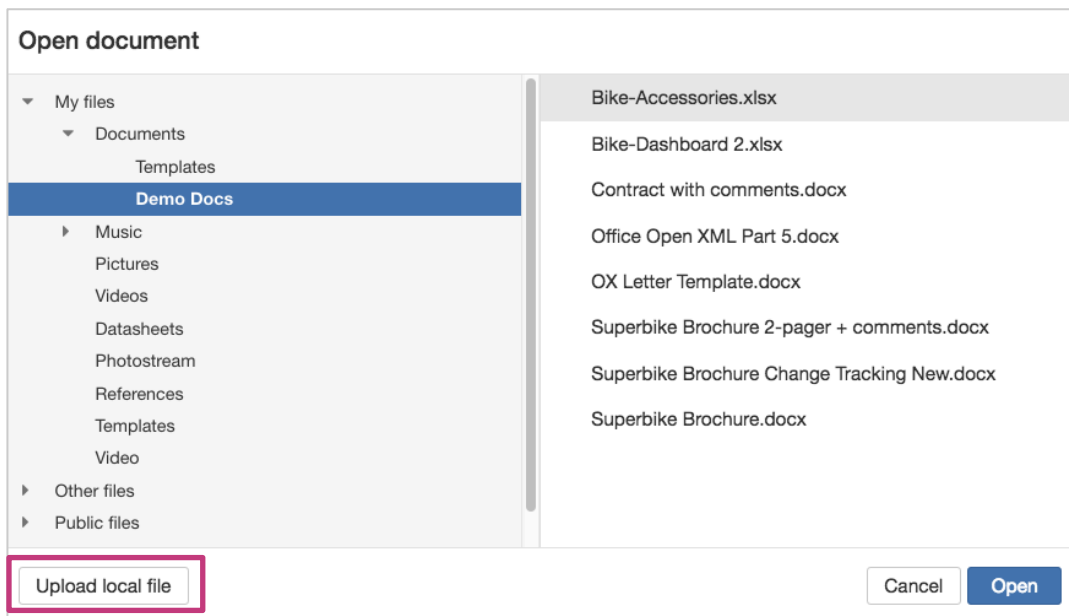
## 2.3 Global Template Folders

To improve template management in OX Documents it is now possible for the context admin to define a global template directory. Templates saved in this read-only directory are automatically available to all users and can be selected in the OX Text or OX Spreadsheet document portal.



## 2.4 Open Document from Local File

To allow a smooth workflow with files on your local disk it is now possible in OX Documents to directly upload a local file in the “Open document” dialog. This saves a detour over OX Drive. Click the “Upload local file” button in the “Open document” dialog.



## 2.5 Borders for images

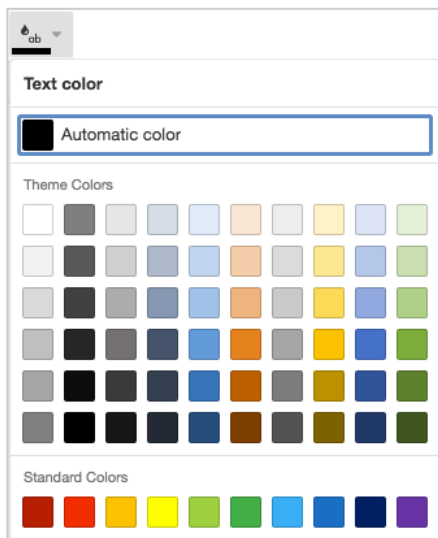
Images in OX Text and OX Spreadsheet can be visually enhanced with a number of different border styles and border colors.



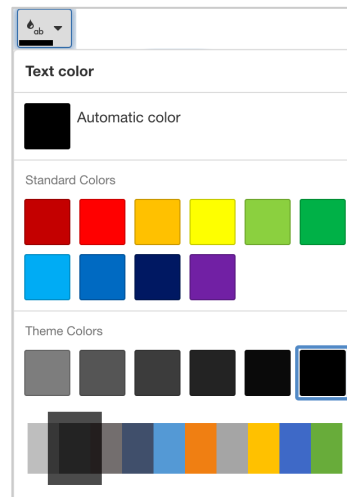
*Image with different borders*

## 2.6 New Color Picker on Small Devices

Due to its responsive design OX Documents automatically adapts to different display sizes. Mobile devices also require a different approach to how features are laid out on screen. For a better user experience on small devices OX Documents now has a touch-device-specific color picker which includes a slider widget.



*Color picker for large screens*



*Color picker for touch devices with slider*



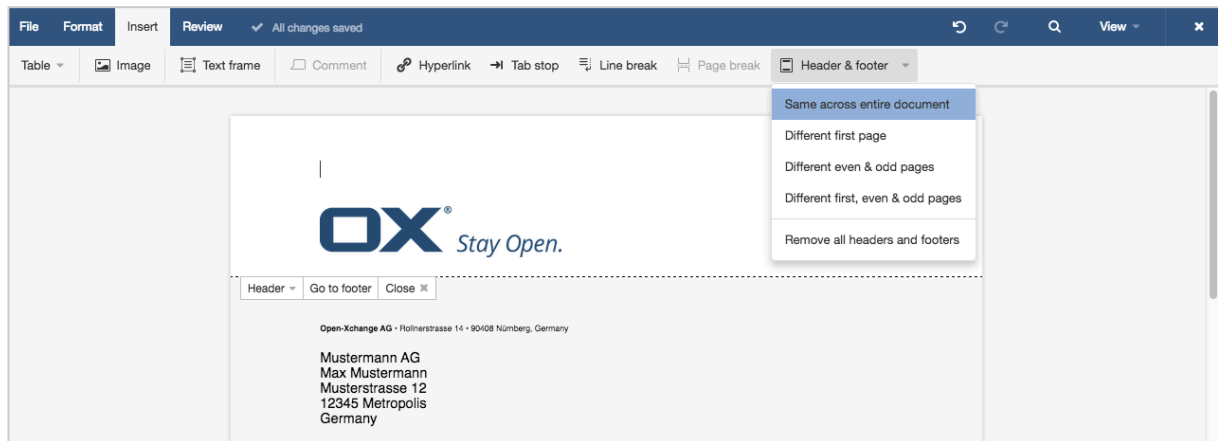
## 3 OX Text

### 3.1 Headers and Footers

Headers and footers are often used in longer documents to keep them organized and make them easier to read. Text entered in the header or footer will appear at the top or bottom of every page. OX Text was already able to display headers and footers in documents. With this release of OX Text, it is now possible to edit or create headers and footers.

#### 3.1.1 Create Headers and Footers

To create a header or footer use the “Header & footer” icon in the “Insert” tab menu or just double-click anywhere on the top or bottom margin of the page. You can also use the keyboard shortcuts (Ctrl+Alt+PgUp/PgDn).



Type and format text in the header and footer the same way you do in the main document. To create more visually interesting documents, you can also add images, like a logo, to your header and footer.

To finish editing the header or footer, click “Close”. Alternatively, you can press the “Esc” key or click in the main document. After you close the header or footer, it will still be visible but appear dimmed. To edit it just double-click anywhere on the dimmed header or footer again.

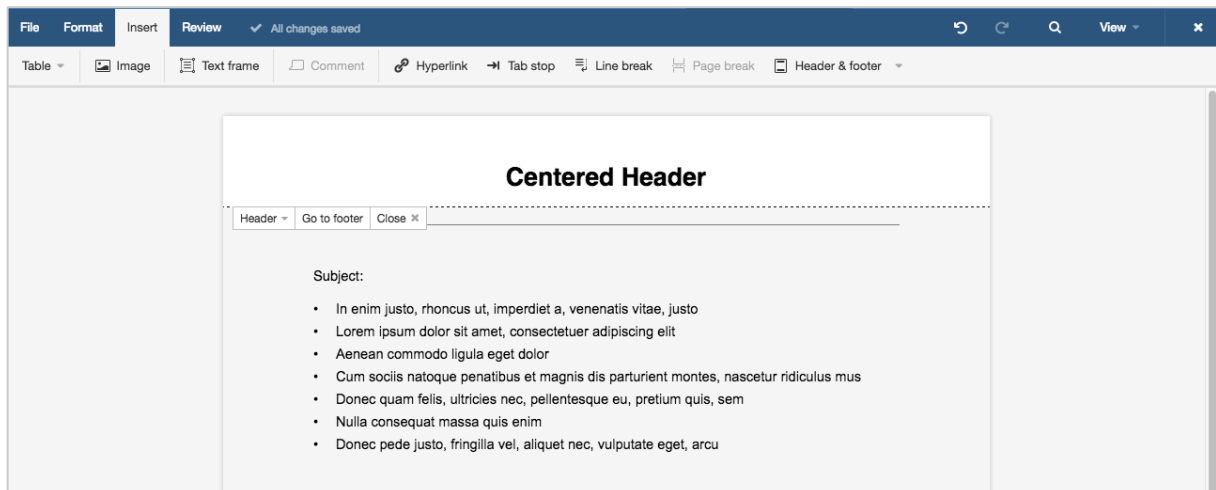
### 3.1.2 Create Different Headers and Footers

By default, OX Text uses the same headers and footers on every page of a document (option “Same across entire document”). For documents like booklets you might want a different header and footer on the left or right side of the document. For other documents it might be better to use a different header or footer for the first page of a document. To customize how the header or footer appears in the document, select one of the following options in the dropdown:

- Same across entire document (default)
- Different first page
- Different even & odd pages
- Different first, even & odd pages

### 3.1.3 Positioning of Headers and Footers

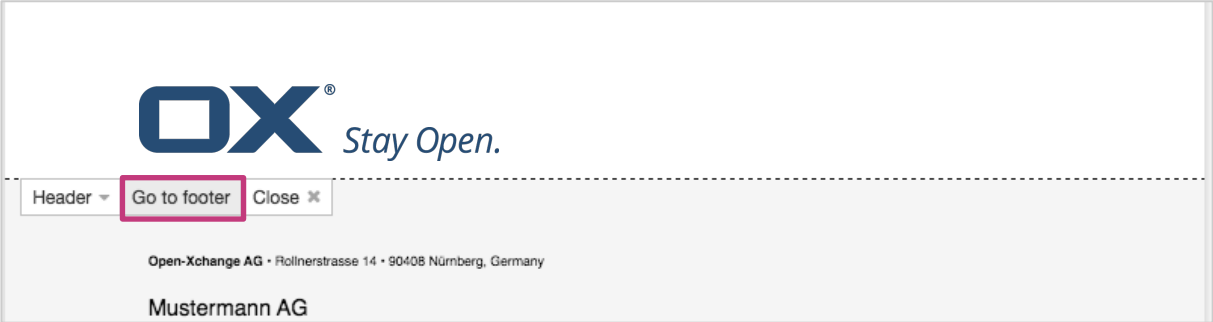
OX Text allows an easy adjustment of the horizontal position of information inside a header and footer. For example, if you want to center a chapter title, or place it flush with the right margin, there are two preset tab stops: centered and right aligned at the right margin. So you just need to press the “TAB” key once to create a center-aligned text in a header or footer. To create right-aligned text, press the “TAB” key once more.



Headers and footers in OX Text are positioned in the top and bottom margins of a document. Only if the header or footer becomes too large vertically to fit in the margin will it start expanding downward (for the header) and upward (for the footer), reducing the space in the body of the document.

### 3.1.4 Navigate between Headers and Footers

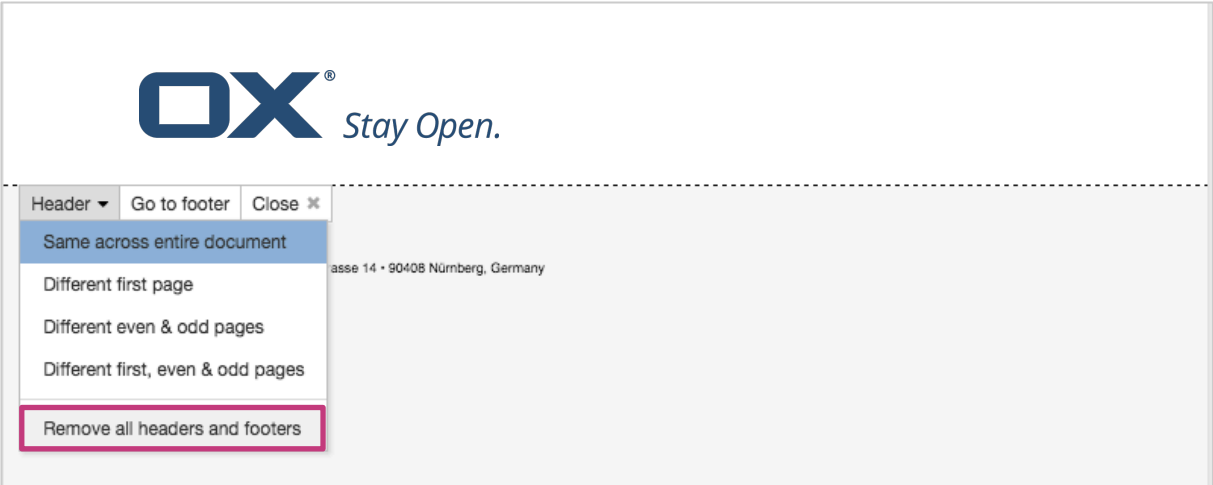
Headers and footers are often edited together. To quickly switch between headers and footers without scrolling up or down manually, there is now an option to directly jump between headers and footers.



### 3.1.5 Remove Headers and Footers

To remove a header or footer, you must delete all the content from it. Once you delete a single header or footer manually, that same header or footer will be removed in the rest of the document. Removing a header or footer will not change the top and bottom margin.

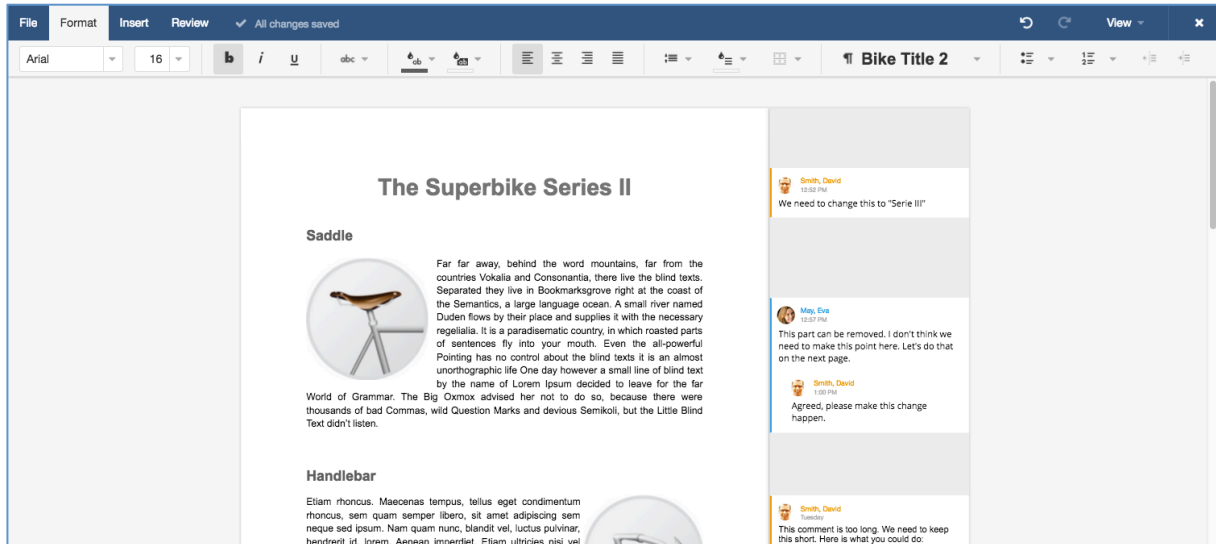
As a document can contain a number of different header and footer types, there is also an option to remove all headers and footers in one step.



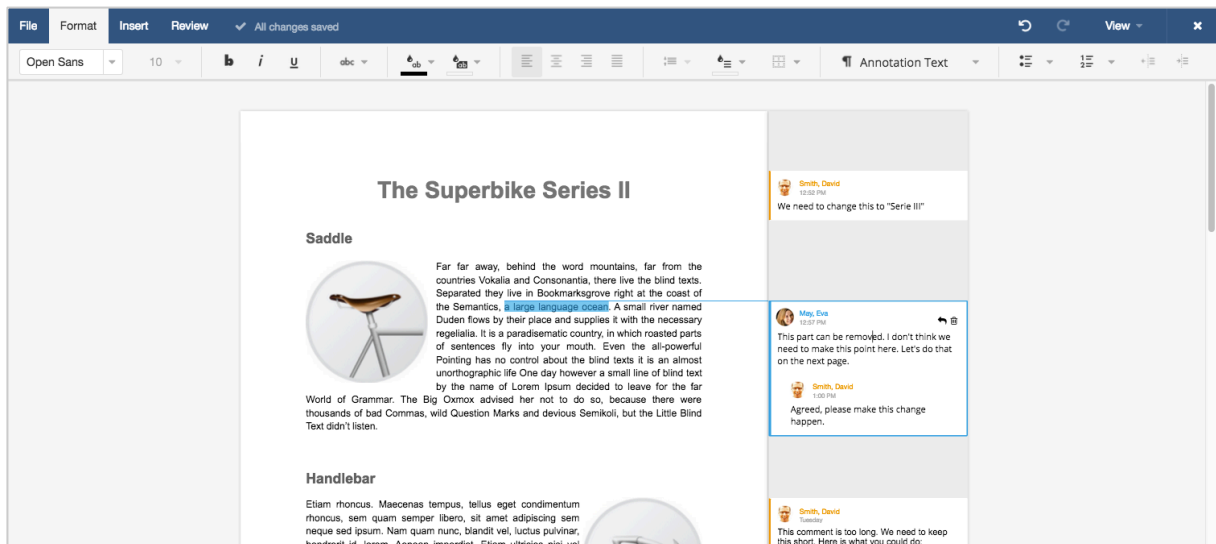
## 3.2 Working with Comments

If you are reviewing a text and you want to give feedback or ask questions about a document without changing the actual content, you can now work with comments in OX Text.

Comments are shown on a grey shaded area in the right document margin so that they do not cover text, or affect the layout of the document. The grey comment area is only visible if the document contains comments.

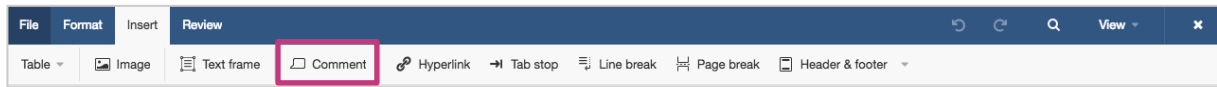


Selecting a comment shows a colored line surrounding it, and a line connecting it to the anchor point of the comment (see also "Viewing Options").

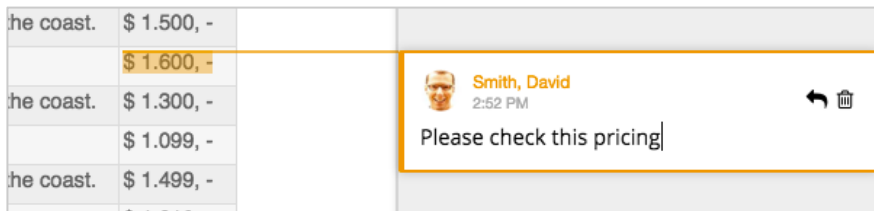


### 3.2.1 Add Comments

Select the text or table content you want to add a comment to and click the “Comment” icon in the “Insert” tab.



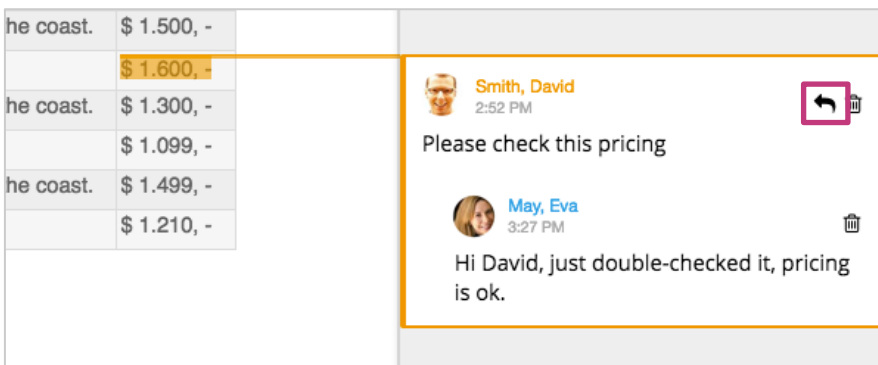
A new comment is created in the right document margin, and connected by a colored line with the anchor point of the comment. OX Text automatically adds the name of the author, a color, a picture and a time stamp in the comment.



Text in comments can also be formatted with a few exceptions: For example the font size of comments, or the alignment, cannot be changed in order to make readability consistent.

### 3.2.2 Reply to a Comment

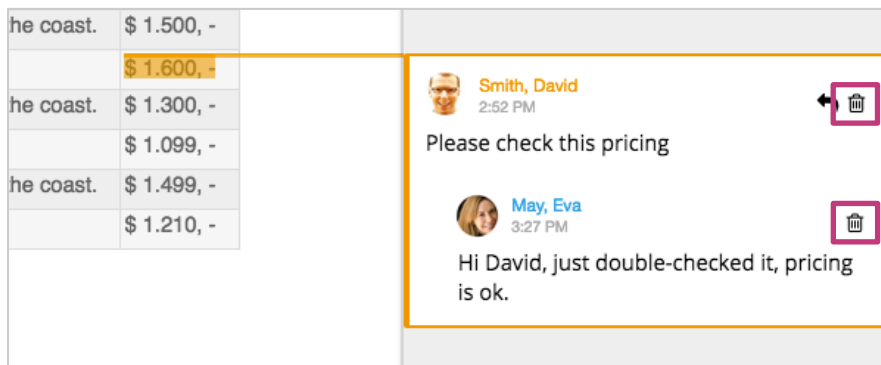
You can also reply to a comment using the “Reply” icon making it easier to follow the conversation.



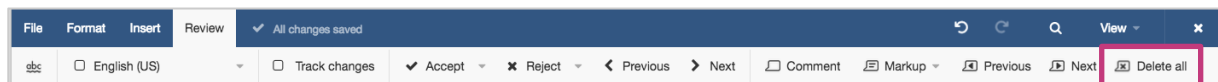
Each author is automatically allocated a different color. For easy user identification this color is the same one that is used to highlight changes by that user in the document via the track changes function.

### 3.2.3 Delete Comments

Select a comment and use the delete-icon in the comment box to remove this comment from the document.

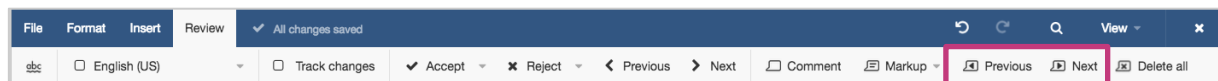


To delete all comments at once in the document, click the “Delete all” icon in the “Review” tab.



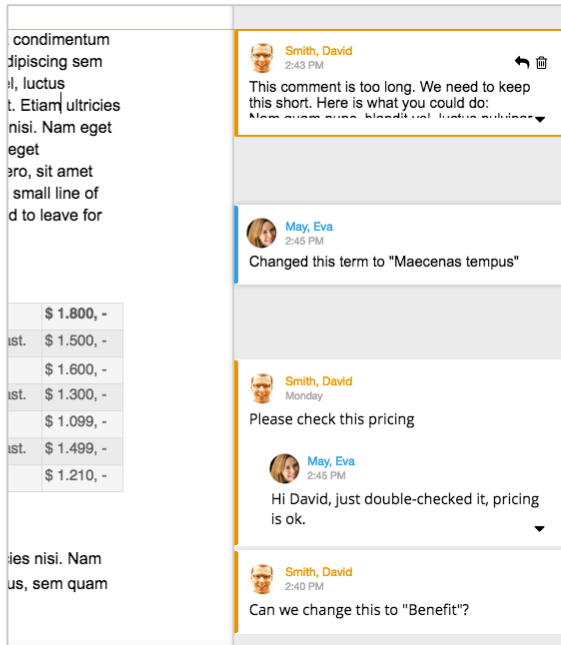
### 3.2.4 Navigate through Comments

You can quickly review comments by navigating from one comment to the next. On the “Review” tab, click “Previous” or “Next” to move through your comments.

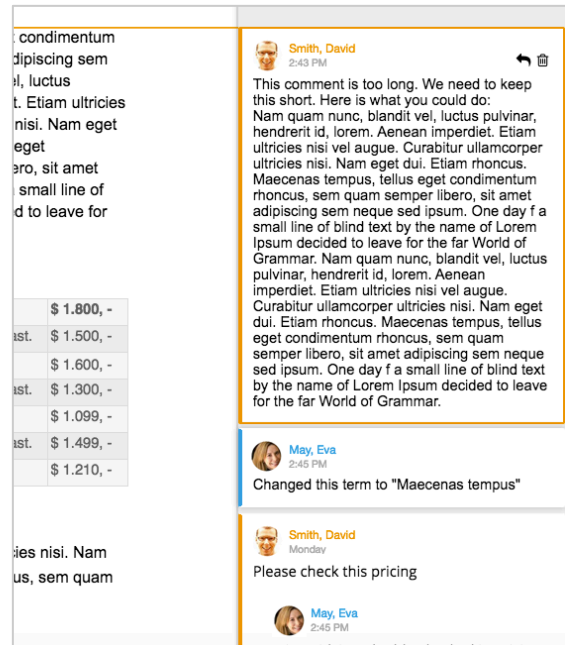


### 3.2.5 Working with Long Comments

If a page contains many long comments, or one comment has a lot of text, it will be shortened automatically. A shortened comment is indicated with a black, downward facing, triangle. To expand, click the comment. Other comments are moved down if necessary.



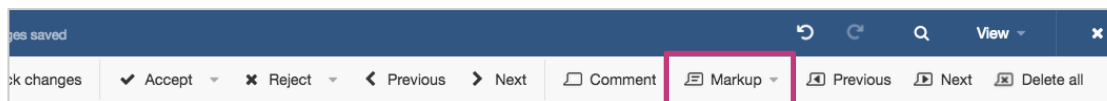
First comment shortened



First comment expanded

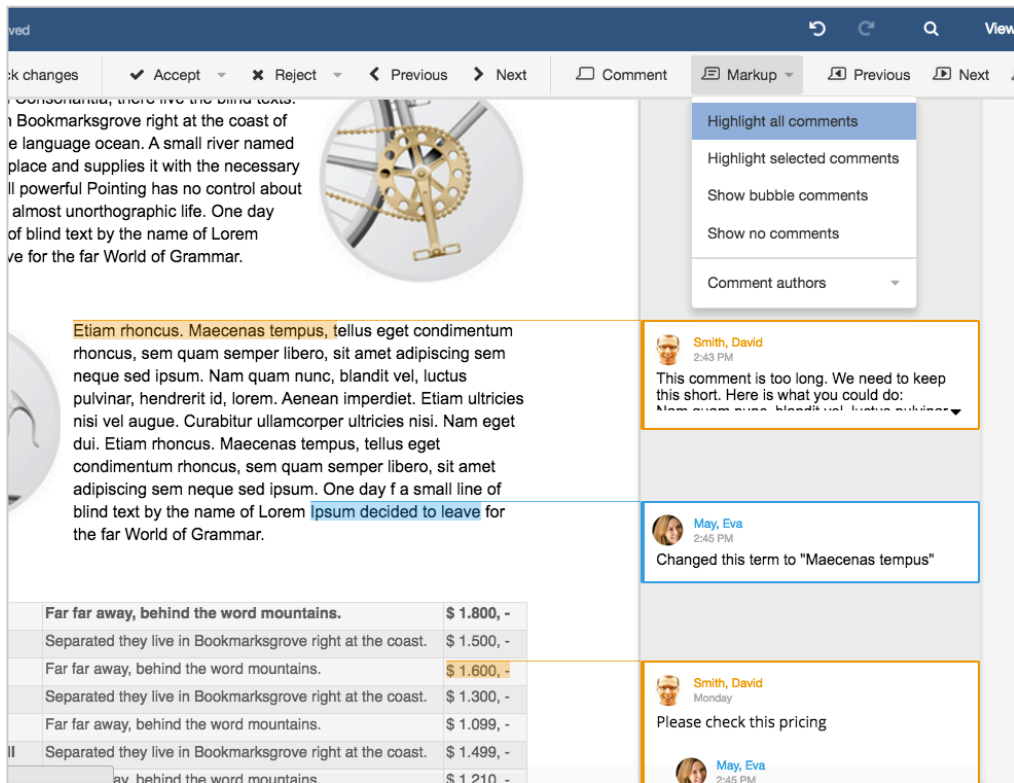
### 3.2.6 Viewing Options

To prevent users from inadvertently distributing documents that contain comments, OX Text displays comments by default. What is more users can display comments in different ways (“Markup”), including a hide all comments (option “Show no comments”).



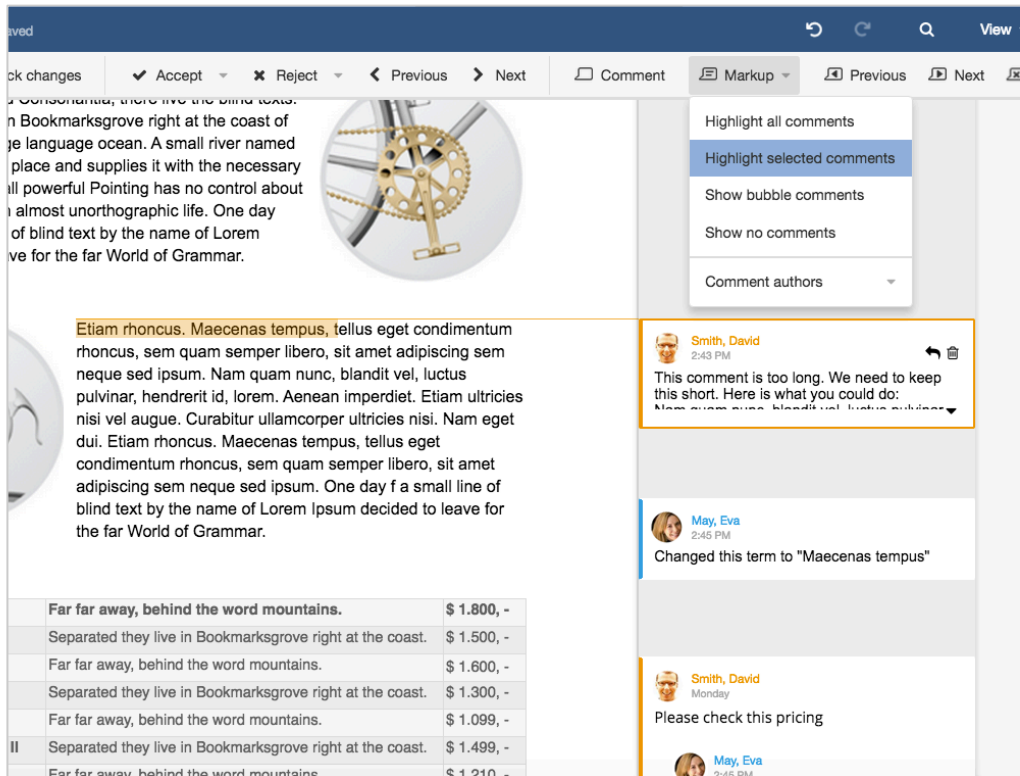
The option “Highlight all comments” displays all connection lines and anchor points in the document. If you have a lot of comments and connection lines, they may become distracting if you are trying to read the document.

To keep the document clean the default in OX Text is to highlight only the selected comment (“Highlight selected comment”). Only if the user inserts, edits or hovers over a comment, will the colored line with the anchor point become visible.



View option “Highlight all comments”: All colored lines and anchors are visible






View option "Highlight selected comments": Only one line and anchor is visible

The option "Show bubble comments" is the default view on touch devices with limited space. Comments are not shown in the right margin but indicated with a colored balloon icon:

The color of the icon is associated with the person who made the comment or changes in the text using the track changes function. This allows an easy identification of the author of the comment. To review the comment tap the icon and a bubble with the comment will appear, and the anchor of the comment in the document will be highlighted.

All changes saved

Track changes
  Accept
  Reject
 < Previous > Next
  Comment
 Markup
 Previous



Etiam rhoncus. Maecenas tempus, tellus eget condimentum rhoncus, sem quam semper libero, sit amet adipiscing sem neque sed ipsum. Nam quam nunc, blandit vel, luctus pulvinar, hendrerit id, lorem. Aenean imperdiet. Etiam ultricies nisi vel augue. Curabitur ullamcorper ultricies nisi. Nam eget dui. Etiam rhoncus. Maecenas tempus, tellus eget condimentum rhoncus, sem quam semper libero, sit amet adipiscing sem neque sed ipsum. One day f a small line of blind text by the name of Lorem ipsum decided to leave for the far World of Grammar.

May, Eva  
2:45 PM  
Changed this term to "Maecenas tempus"

### Pricing Table

Superbike Flash	Far far away, behind the word mountains.	\$ 1.600, -
Superbike Jedi	Separated they live in Bookmarksgrove right at the coast.	\$ 1.500, -
Superbike Obi-Wan	Far far away, behind the word mountains.	\$ 1.600, -
Superbike Spock	Separated they live in Bookmarksgrove right at the coast.	\$ 1.300, -
Superbike Chubaka	Far far away, behind the word mountains.	\$ 1.099, -
Superbike Battelstar II	Separated they live in Bookmarksgrove right at the coast.	\$ 1.499, -
Superbike Force	Far far away, behind the word mountains.	\$ 1.210, -

### Product Features

Aenean imperdiet. Etiam ultricies nisi vel augue. Curabitur ullamcorper ultricies nisi. Nam

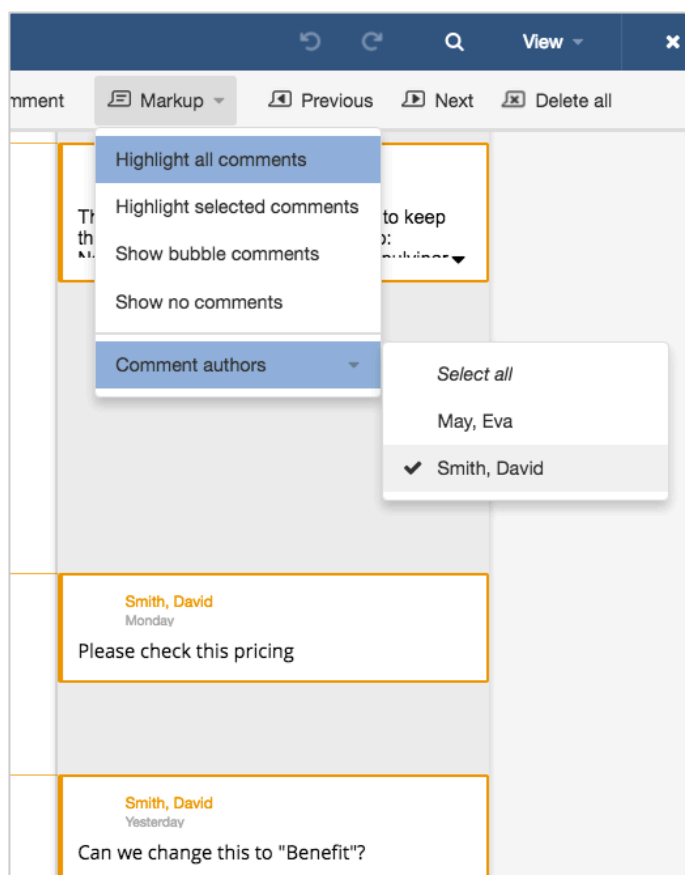
A conversation (threaded comments) is indicated with this icon: 

With this viewing option, you can focus on reading the document and you only see the comments that you want, when you want it.

Note: Clicking the name in a comment opens the Halo view with additional information about this person. This allows you to check that person's availability, send an email or learn more about your latest appointments or conversations.

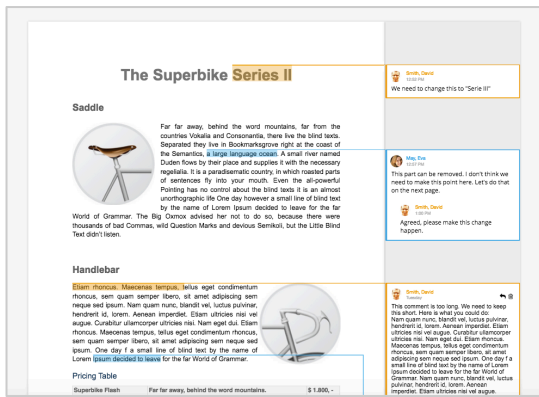
### 3.2.7 Filtering Comments

If you are working on a document with other teammates there could be many comments in a document. To make reviewing comments more manageable you can filter comments. To view the comments that were made by a specific author, click “Markup” in the “Review” tab, and then click the option “Comment authors”. Select the author’s name whose comments you want to display and OX Text filters the comments.

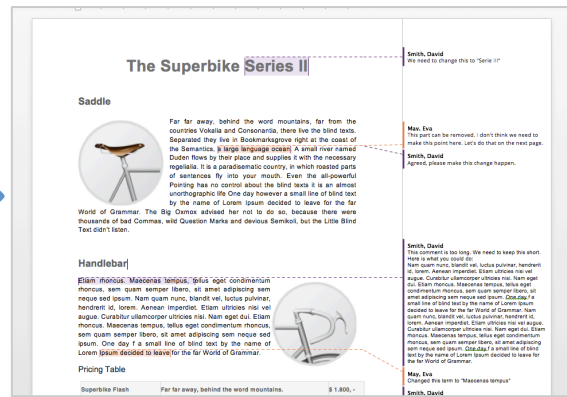


### 3.2.8 Exchange comments with MS Word users

One of the key benefits of OX Text is the ability to exchange documents in a lossless way with MS Word users (“round-tripping”). This round-trip allows OX Text and MS Word users to collaborate smoothly on the same document. This also applies to comments. Documents with comments created in MS Word carry over in OX Text and vice versa. Comments created in OX Text also show up as comments when opened in Microsoft Office.



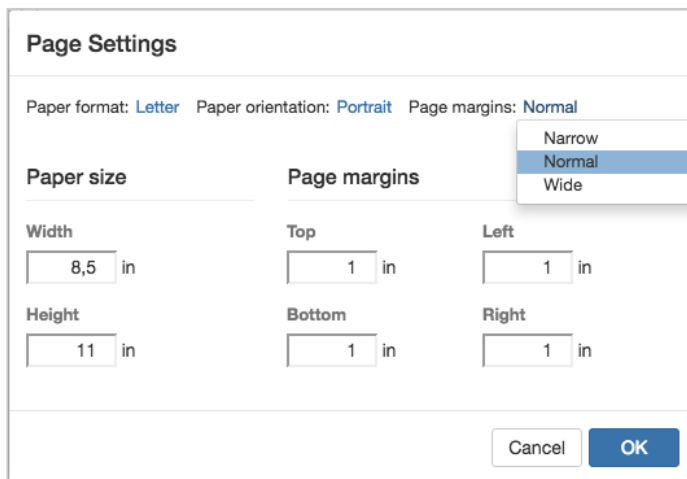
Comments in OX Text



Same comments in MS Word 2016

### 3.3 Modify Page Settings

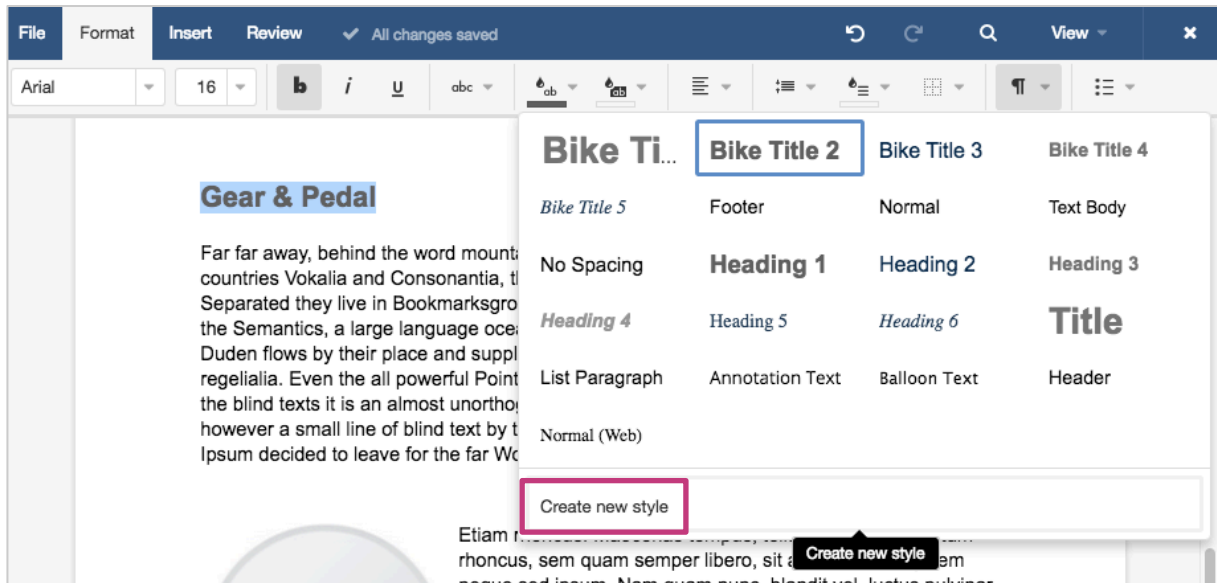
OX Text offers a new option in the “File” tab to modify page settings. Users can now select the paper format, change the orientation of the page, or reduce or enlarge the content of a page. It is now also possible to create custom paper size and page margins.



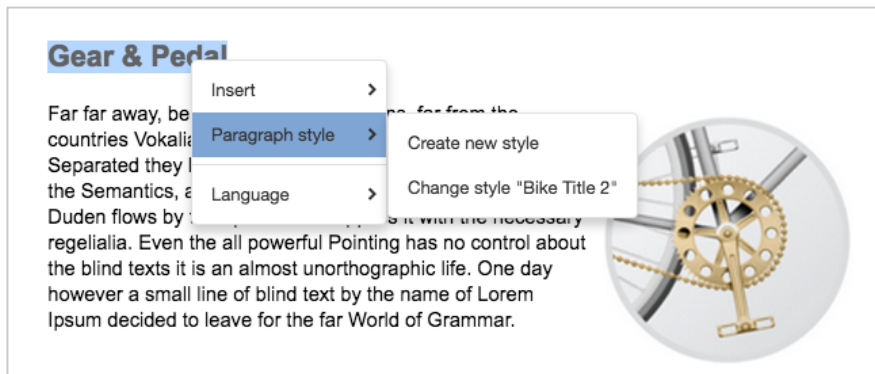
### 3.4 Create User Defined Paragraph Styles

Paragraph styles determine the look of the text in a document. OX Text is able to re-use paragraph and table styles imported from the original Word document. Now it is also possible to change styles and create new user defined paragraph styles.

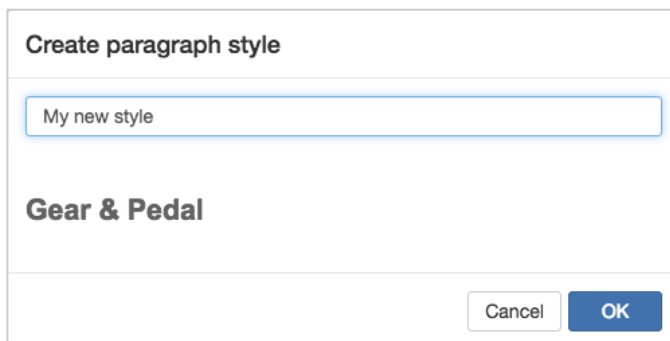
To create a new style from manually formatted text, click “Create new style” in the “Paragraph style” dropdown:



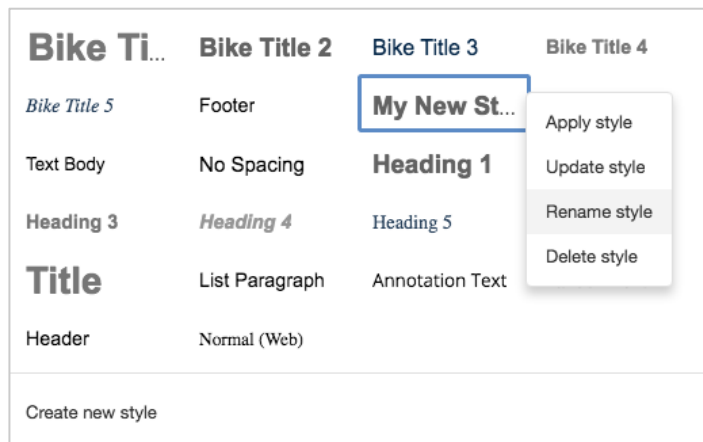
You can also reach this option via the context menu.



Type a new name in the “Create paragraph style” dialog, which provides a preview of the text selection.



The new paragraph style is added to the list of paragraph styles and can now be applied elsewhere in the document. To rename or delete this new paragraph style, use the context menu.



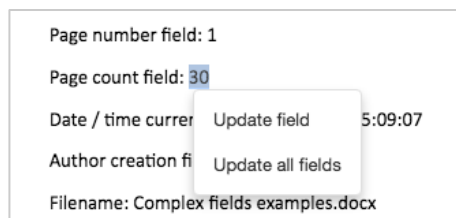
### 3.5 Fields

With fields, users can add dynamic elements to a text document. For example, fields are at work when a page number or date is displayed that automatically changes.

OX Text now displays fields inserted in Word or OpenOffice Writer documents correctly. The following fields can even be updated to display up-to-date information:

- **Page number** and **number of pages** used in headers and footers are updated automatically
- **Page number** and **number of pages** used in the main text can be updated manually, like in Word
- **Current date** and **current time** is updated automatically during document load and print. Both fields can also be updated manually
- **File name** can be update manually

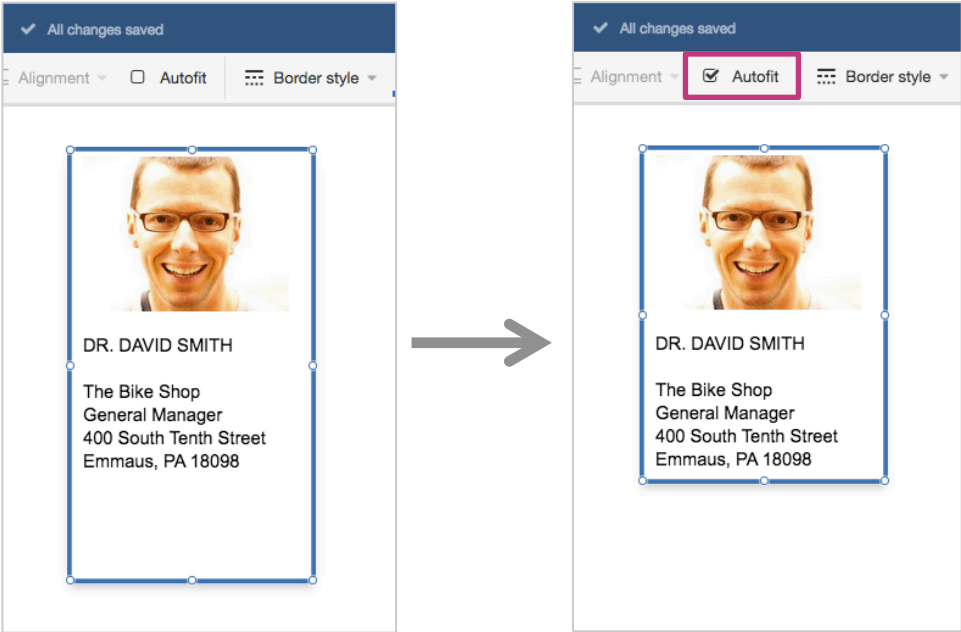
To update a field manually, click the field and press F9 or use the context menu.



### 3.6 Autofit for Text Frames

If you use text frames as a design element in your documents, they allow resizing of your text. When the amount of text within the frame shrinks or grows, the height of the text frame will automatically resize. If you resize the text frame manually in vertical direction, the “Autosize” function is disabled.

Now you can enable this “Autosize” feature again after resizing a text frame with the new option “Autofit”. The height of the text frame will automatically adjust.



*Resized text frame*

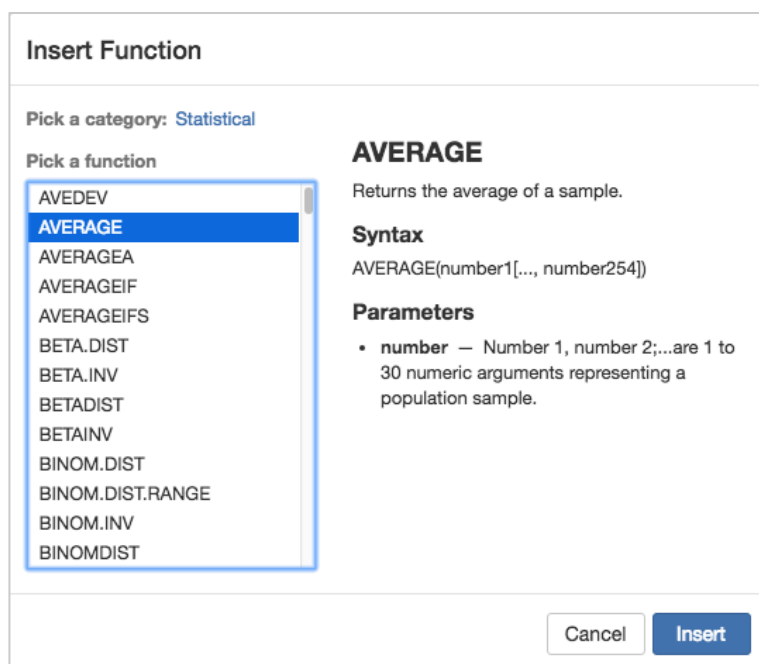
*Text frame with “Autofit”*

## 4 OX Spreadsheet

### 4.1 Function Wizard

OX Spreadsheet offers a wide range of formulas that can be used for basic number crunching, such as addition or subtraction, as well as more complex calculations, such as finding the average on test results or calculating mortgage payments.

But how to find and use all the functions and formulas within OX Spreadsheet? Since you might not be familiar with how some functions are structured, you can now use the Function Wizard to assist you. To activate the Function Wizard, click the “Fx” Function button in the “Insert” tab.



Select a category and all the functions that sit in there will be listed. You can now look through this list, select a function and by looking at the description see if it meets your needs. Choose the right function and click “Insert” to insert the function into a cell. Enter the addresses of the required cells to be used in the function that fits the syntax of the chosen function.

The Function Wizard also helps if you have a spreadsheet with a function in it that you do not fully understand. If you click on the cell with the function you want to understand, the Function Wizard pops up with the function argument and explanation. This allows you to understand any function that is used in a spreadsheet.



To help users save time while searching for the right function, the Function Wizard supports as-you-type suggestions in the function list. Functions are grouped in the following categories:

- All
- Complex
- Database
- Date and time
- Engineering
- Financial
- Information
- Logical
- Math
- Matrix
- Reference
- Statistical
- Text

## 4.2 Conditional Formatting

Sometimes it is hard to read and interpret data by scanning rows and rows of information. Conditional formatting lets you differentiate data at a glance. For example, it highlights important information in a cell that features a specific name or date, or differentiates high, medium and low values.

OX Spreadsheet can now display conditional formatting from existing spreadsheet documents. The following formatting rules are supported:

- A formula expression resulting in true or false
- Comparison rules (equal to, greater than, less than, etc.)
- Text matching (contains, starts with, etc.)
- Date matching (today, yesterday, next month, etc.)
- Blank cells, error cells, duplicate cells, etc.
- “Top 10” conditions, average conditions

A cell can also have more than one rule.

	A	B	C	D	E	F	G
1	<b>CONDITIONAL FORMATTING TEST DOCUMENT</b>						
2							
3	<b>1.1 - VALUE CONDITION OPERATORS</b>						
4	Condition						
5	value between 3 and 7	1	3	5	7	9	
6	value not between 3 and 7	1	3	5	7	9	
7	value equal to 5	1	3	5	7	9	
8	value not equal to 5	1	3	5	7	9	
9	value greater than 5	1	3	5	7	9	
10	value less than 5	1	3	5	7	9	
11	value greater than or equal to 5	1	3	5	7	9	
12	value less than or equal to 5	1	3	5	7	9	
13							
14	<b>1.2 - TEXT CONDITION OPERATORS</b>						
15	Condition						
16	text contains "DE"	ABCD	BCDE	CDEF	DEFG	EFGH	
17	text does not contain "DE"	ABCD	BCDE	CDEF	DEFG	EFGH	
18	text begins with "DE"	ABCD	BCDE	CDEF	DEFG	EFGH	
19	text ends with "DE"	ABCD	BCDE	CDEF	DEFG	EFGH	
20	text ends with ""D""	ABCD!	ABC\$D\$	ABC"D"	ABC#D#	ABC*D*	

A few examples for conditional formatting

Creating new conditional formatting rules is not possible yet and will be added in future releases.

### 4.3 Named Cell Ranges

Named cell ranges allow you to give cell or group of cells a meaningful name that is easy to read and remember. As a result, entering formulas becomes easier and complex spreadsheets become more readable. For example, instead of using "C30" to reference a cell (or "C30:C42" for a group of cells), you can name a cell or group "Budget\_total".

To create a range name, select the cell or range that you want to define. Click "Named ranges" in the "Data" tab. This will open a popup window that allows you to create and manage all your ranges. You can also access this popup by the context menu.

The screenshot shows an Excel spreadsheet with a table of bike accessories. The table has columns for 'Handlebar', 'Fixie', 'Road', 'Track', and 'Total', and rows for 'Week 1' through 'Week 13'. A 'Named Ranges' popup window is open on the right, listing the named ranges: 'Fixie' (range '\$C\$30:\$C\$42'), 'Road' (range '\$D\$30:\$D\$42'), and 'Track' (range '\$E\$30:\$E\$42'). A '+ Add new named range' button is visible in the popup.

	Handlebar	Fixie	Road	Track	Total
Week 1		33	14	23	70
Week 2		23	34	17	74
Week 3		34	32	19	85
Week 4		22	45	33	100
Week 5		21	67	21	109
Week 6		16	34	11	61
Week 7		18	65	21	104
Week 8		14	34	14	62
Week 9		13	22	43	78
Week 10		19	23	10	52
Week 11		17	32	31	80
Week 12		22	15	23	60
Week 13		28	46	11	85
		280	463	277	1020

Click “Add new named range” and define your range name in the “Insert name” dialog. The “Formula” field defines the range itself. If you highlighted cells before adding a new named range, the range address will already be inserted. You can also define the range manually by typing in this field. Click “Insert” to create the new range. The new range will show up in the popup window.

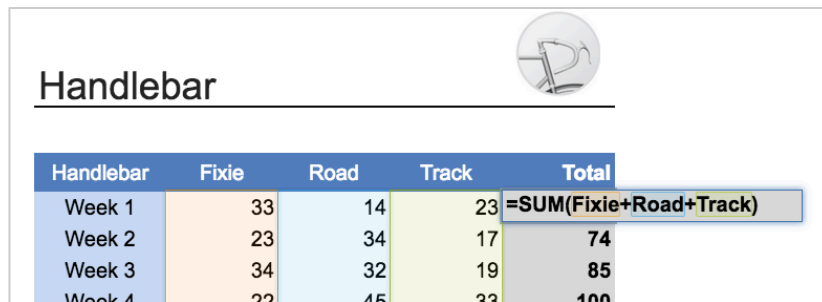
The 'Insert name' dialog box is shown with the following fields:

- Name:** Fixie
- Formula:** 'Bike Accessories'!\$C\$30:\$C\$42

Buttons for 'Cancel' and 'Insert' are visible at the bottom.

If you hover over the name of the range in the popup, the range in the spreadsheet is highlighted. To remove a named range, click the “Trash” icon.

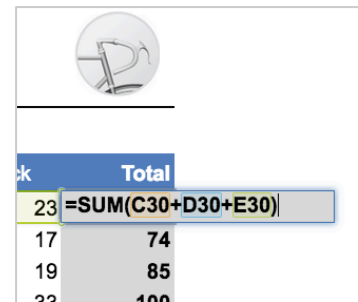
Calculating in OX Spreadsheet can now work with these named ranges instead of cell ranges.



The screenshot shows a spreadsheet titled "Handlebar" with a circular logo in the top right. The table has five columns: "Handlebar", "Fixie", "Road", "Track", and "Total". The "Total" column contains a formula: `=SUM(Fixie+Road+Track)`. The data rows are:

Handlebar	Fixie	Road	Track	Total
Week 1	33	14	23	<code>=SUM(Fixie+Road+Track)</code>
Week 2	23	34	17	74
Week 3	34	32	19	85
Week 4	22	45	33	100

*Named ranges in functions*



The screenshot shows a spreadsheet with a circular logo in the top right. The table has two columns: "Track" and "Total". The "Total" column contains a formula: `=SUM(C30+D30+E30)`. The data rows are:

Track	Total
23	<code>=SUM(C30+D30+E30)</code>
17	74
19	85
33	100

*Cell ranges in functions*

## 4.4 Improved Performance

### 4.4.1 Painting with Canvas

OX Spreadsheet already used a canvas element to paint the grid and cell attributes like borders and background. Now text is also rendered into an HTML canvas element. This allows better performance when zooming, scrolling or changing columns or rows.

### 4.4.2 Optimized Rendering for Retina Displays

Rendering in OX Spreadsheet also takes Retina displays into account so that spreadsheet documents do not look pixelated and blurred on these devices.

### 4.4.3 Prefetch Views for Scroll Performance

This performance improvement affects scrolling in a spreadsheet. The view areas above, below, right and left of the active sheet are prefetched and cached. If the user starts scrolling, the view update now feels more responsive.

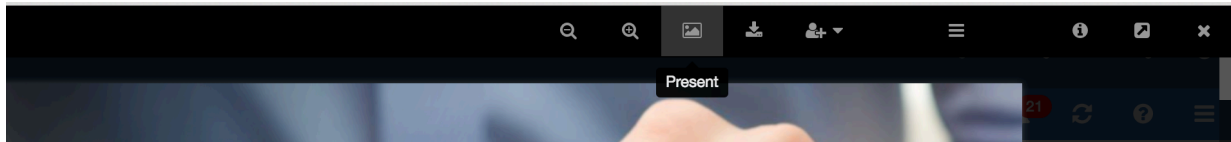
## 5 Present Online

OX Documents introduces a new way to work with existing PowerPoint presentations. Users can now not only view the presentation, but also present online using the new OX Presenter app and broadcast their PowerPoint slides over the web. Remote users can then follow along in their web browser.

### 5.1 Show PowerPoint Slides

OX App Suite v7.8.0 provides a new viewing overlay (see the OX App Suite What's New Guide) which also displays PowerPoint files. The focus of this viewing overlay is to quickly consume any kind of data consistently, including presentations. Therefore all slides of a PowerPoint file are displayed one below the other. This allows users to quickly scroll through a presentation and consume the content.

If the user now decides to present these PowerPoint slides to local, or remote attendees, he can start a presentation from within the viewing overlay with a new option called "Present".



#### 5.1.1 How it Works

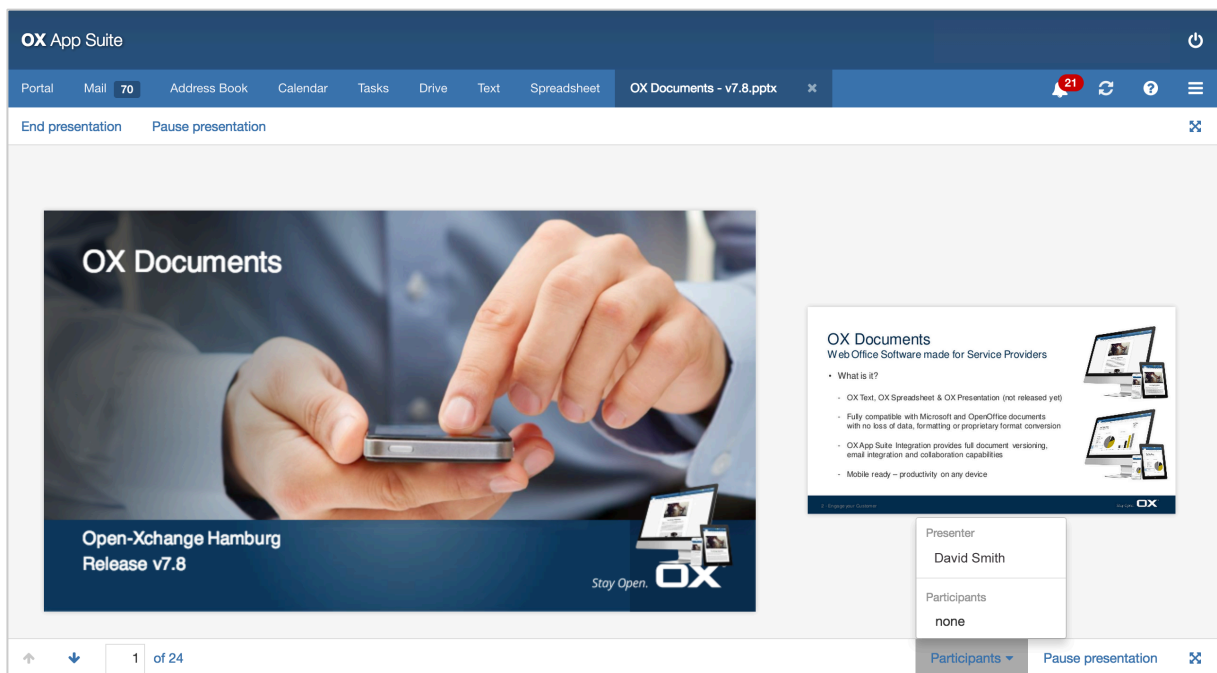
Clicking the "Present" icon starts the Presenter app and opens the PowerPoint file automatically. The Presenter app allows you to navigate through the slides horizontally via thumbnails, navigation buttons, keyboard shortcuts or clicking the slide. The user can also zoom in and out and start a presentation.



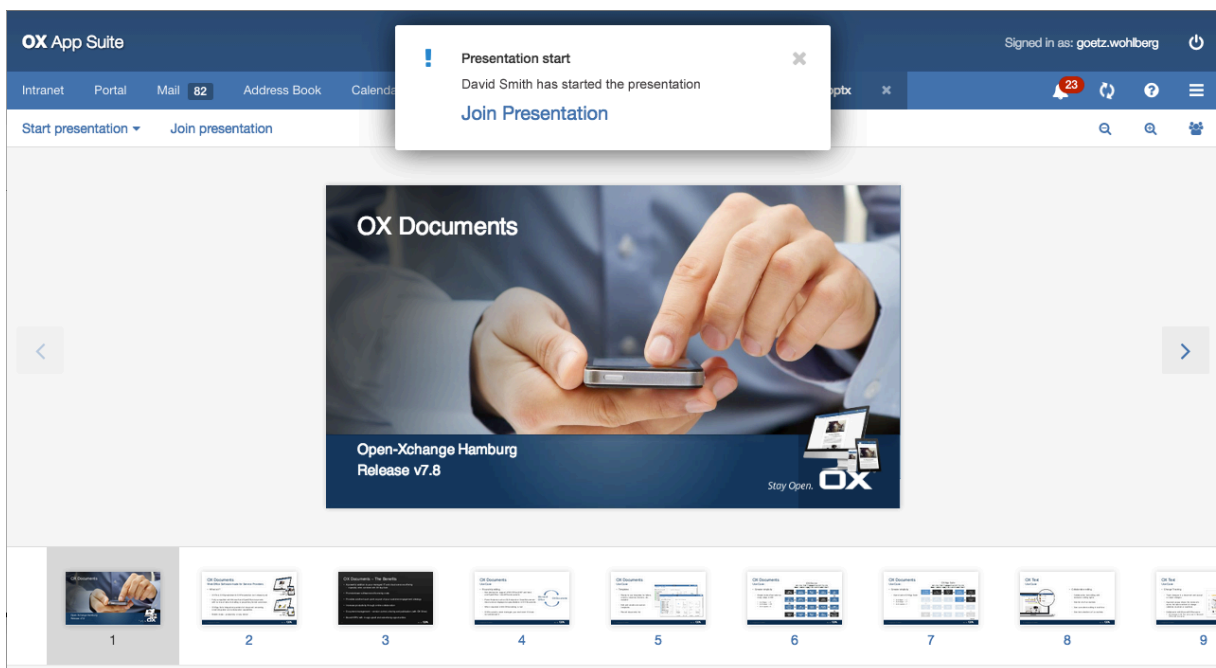
Two modes of presenting are supported: For face-to-face meetings use the “Start local presentation” mode, which allows the presentation to be viewed in fullscreen. If you have remote participants, use the remote presentation mode.

Starting a remote presentation switches the view to the Presenter view, which shows the current and the next slide. This view also allows you to switch to full screen mode and to end or pause the presentation. With the navigation bar at the bottom, users can jump directly to a slide or check who is participating in the presentation.

Please make sure that all remote attendees have sufficient rights and access to the URL of the PowerPoint file in OX Drive. You can send the URL of the file in the Presenter view via email or use the new sharing feature (see OX App Suite What’s New Guide).



All remote participants who want to join the presentation and have this URL open, receive a notification, that the presentation has started and that they now can join.



Joining the presentation switches the view to fullscreen. All remote participants will now see the same slide and navigation in real time, and can follow along. The presenter can see the names of all remote participants in the participant list. After the presenter ends the meeting, all remote attendees receive a notification.

Note: Fullscreen mode is not supported on iOS devices.

### **5.1.2 Using a Mobile Device as a Remote Control**

Starting a remote presentation also makes sense for a local presentation if the presenter wants to use two devices: a laptop for projecting and a mobile device for navigating. In this scenario the presenter would start a remote presentation on the mobile device and join the presentation with the laptop. The presenter can now use the mobile device for navigating while the laptop projects the slides in fullscreen.